Polaris Patron Renewal

Peace
Library System
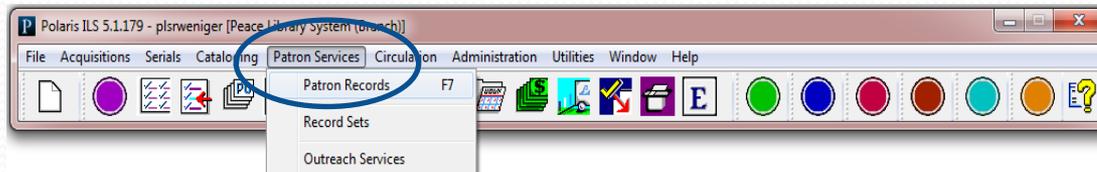
Renewing a Registered Patron

- Login to Polaris and open a "Patron Records Search Tool" ("F7") or…

- Click on "Patron Services" and then choose "Patron Records" from the alphabetical dropdown list,
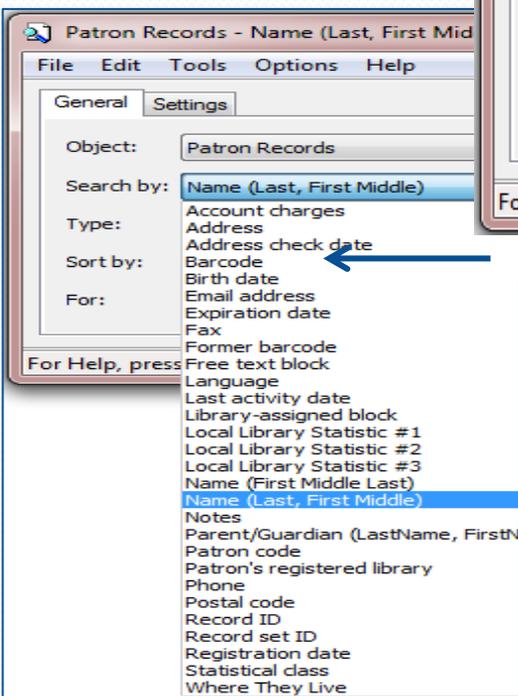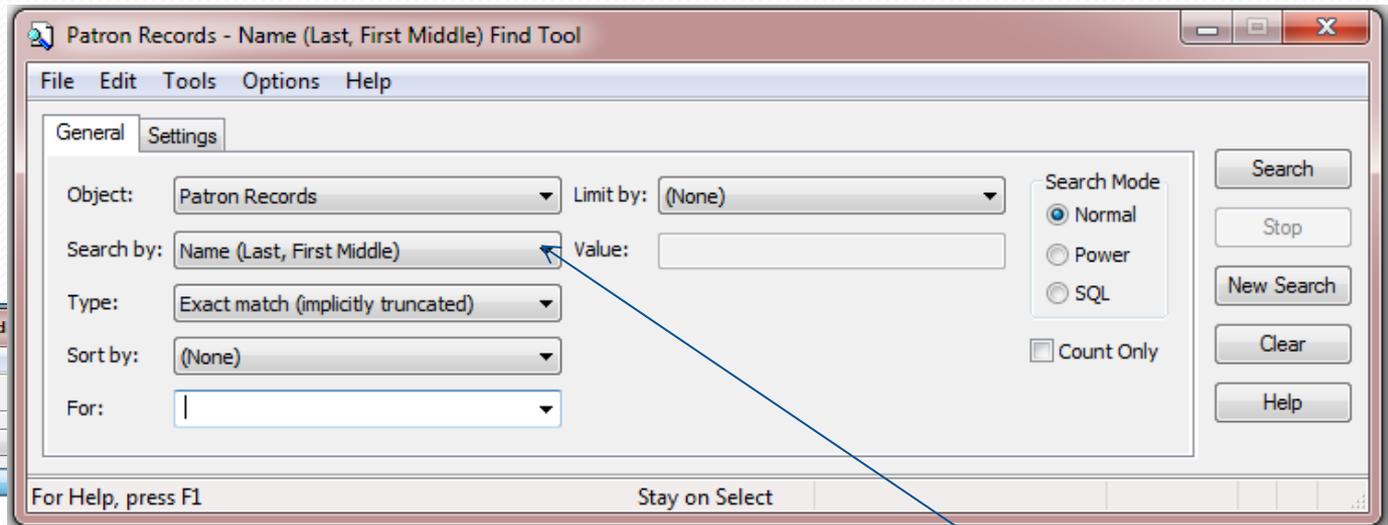

- OR, click on the red button to open the "Patron Services" view of the tool bar and click on the "Patron Records" icon.
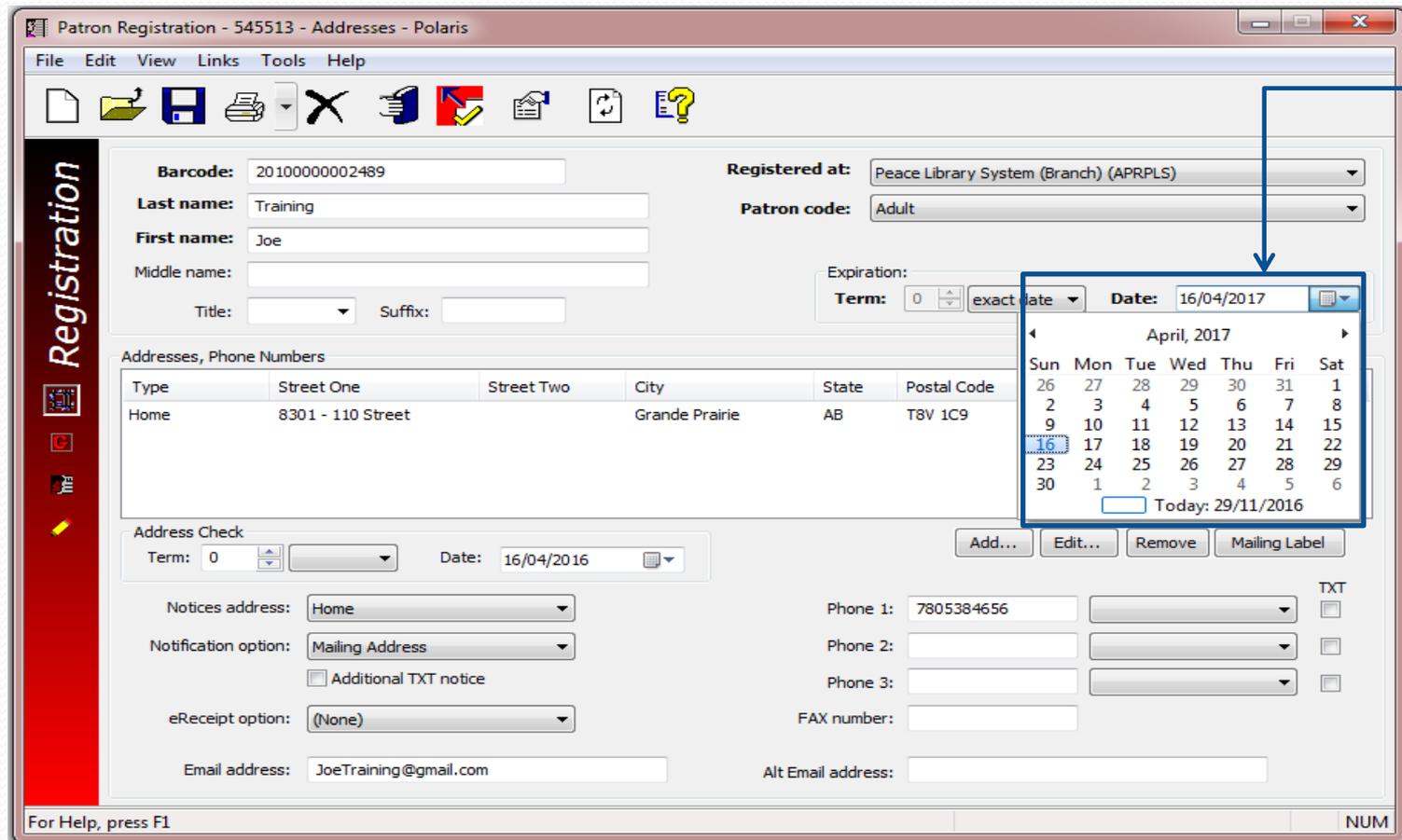
Renewing a Registered Patron

Searching for your Patron's Registration in Polaris

1. Click on the down arrow on the second "<u>Search by</u>" field on the General tab of the Find Tool to change the search parameter and search by, for example, patron "Barcode".
2. Enter the patron name or barcode number in the fifth "<u>For</u>" field and press enter or click on "Search" on the right.
3. If more than one patron has the same name, be sure to select the correct patron from the generated list.

Renewing a Registered Patron

The expiration date on the "Patron Registration Workform" needs to be advanced one year. Click on the down arrow and advance to the correct date by clicking on the arrows.

Renewing a Registered Patron

The "address check" date on the "Patron Registration Workform" needs to be advanced one year. Click on the down arrow and advance to the correct date by clicking on the arrows.

Renewing a Registered Patron

Confirm the Patron's address.
Double click on the address to bring up the edit screen.
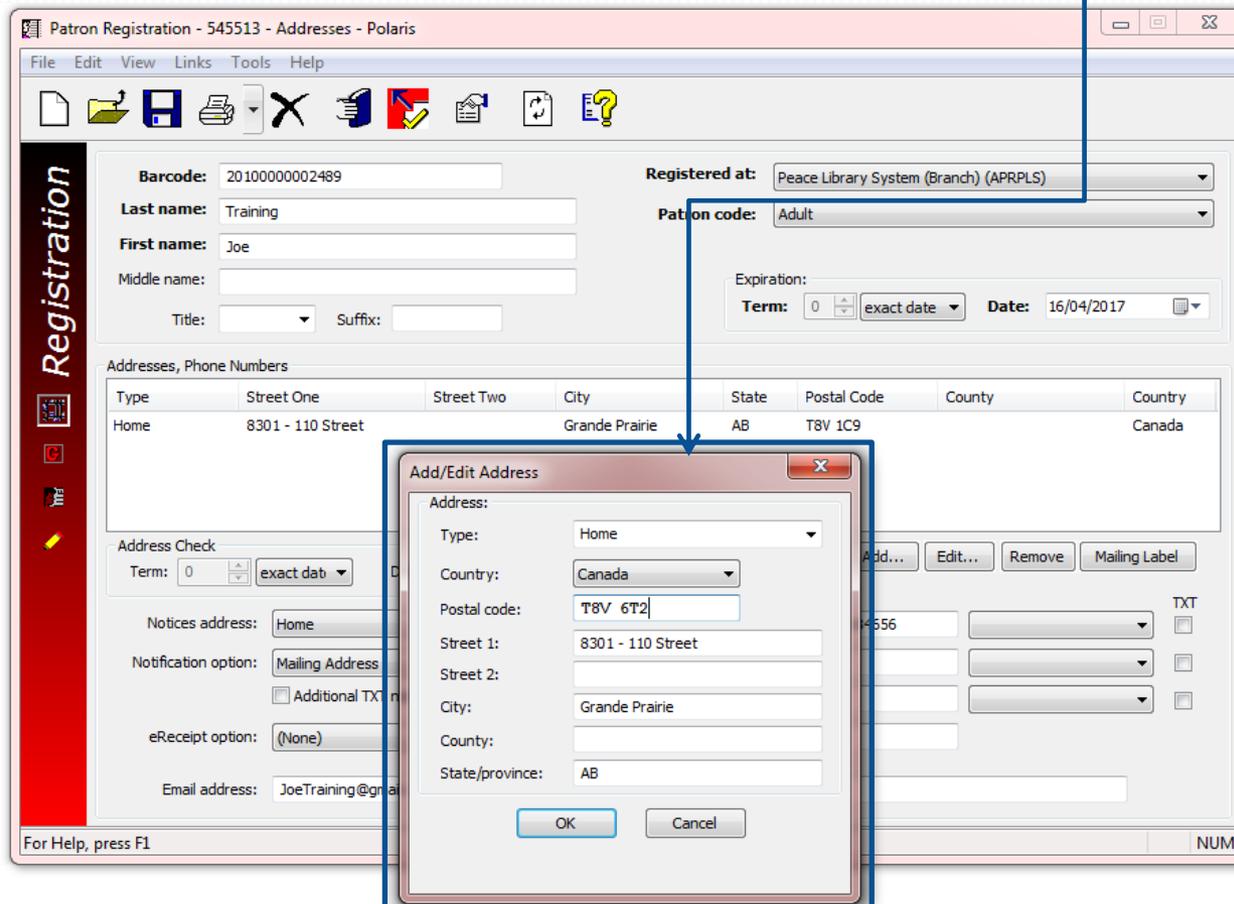
Renewing a Registered Patron

Confirm the patron's email address and telephone numbers.
For cell phones, select the carrier from the drop down list and put a check mark in the TXT box.

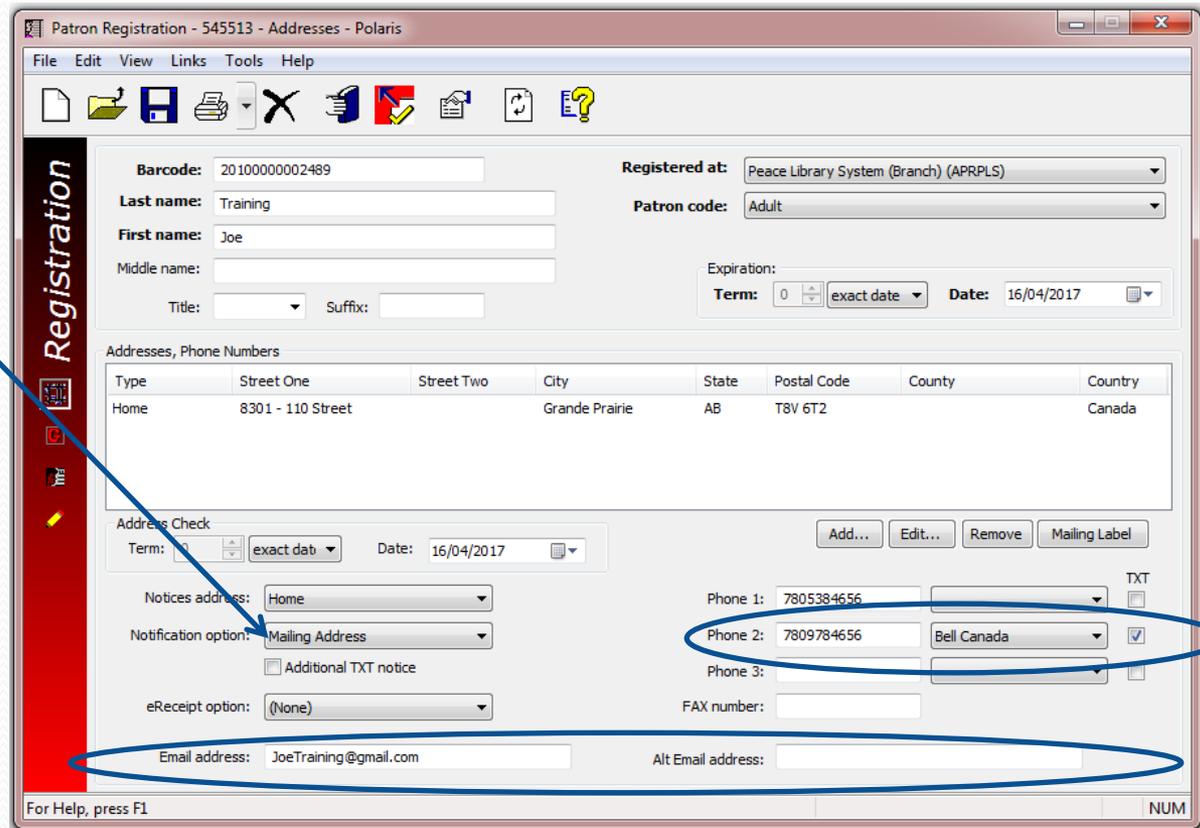Encourage the Patron to receive email, text, or phone* messages, rather than the default, by mail.
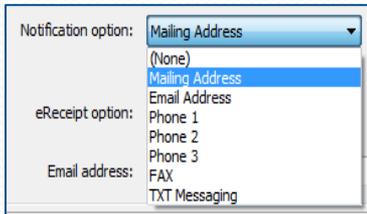
DO NOT select FAX (not enabled.)

Polaris will then email, phone (telephony*) or send text notifications [holds, almost overdues, card almost expired] to patrons.

*Telephony (automated voice messages by telephone) can be set up for your library by the PLS IT manager.

Renewing a Registered Patron

Remember to **Save** your work!

Polaris will update this registration overnight, but if the patron wants to use their card the <u>same day</u> they renewed it, two further steps are required.
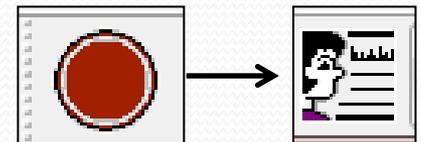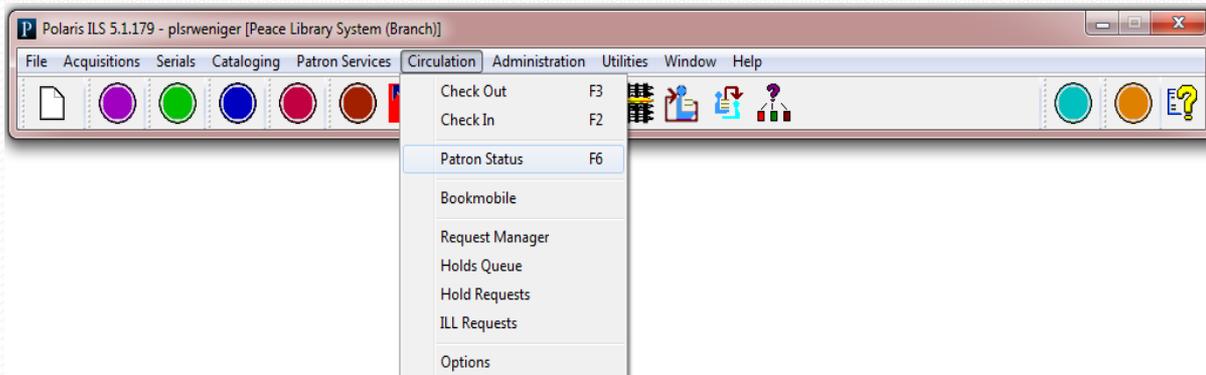
Renewing a Registered Patron

From the "Patron Registration Workform" click on keyboard function key "F9" OR click on the Links menu option, then on "Patron Status" to link to the "Patron Status Work Form".
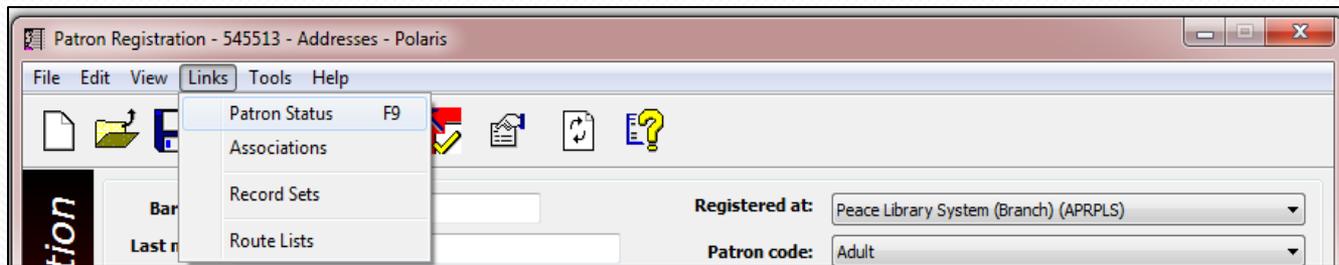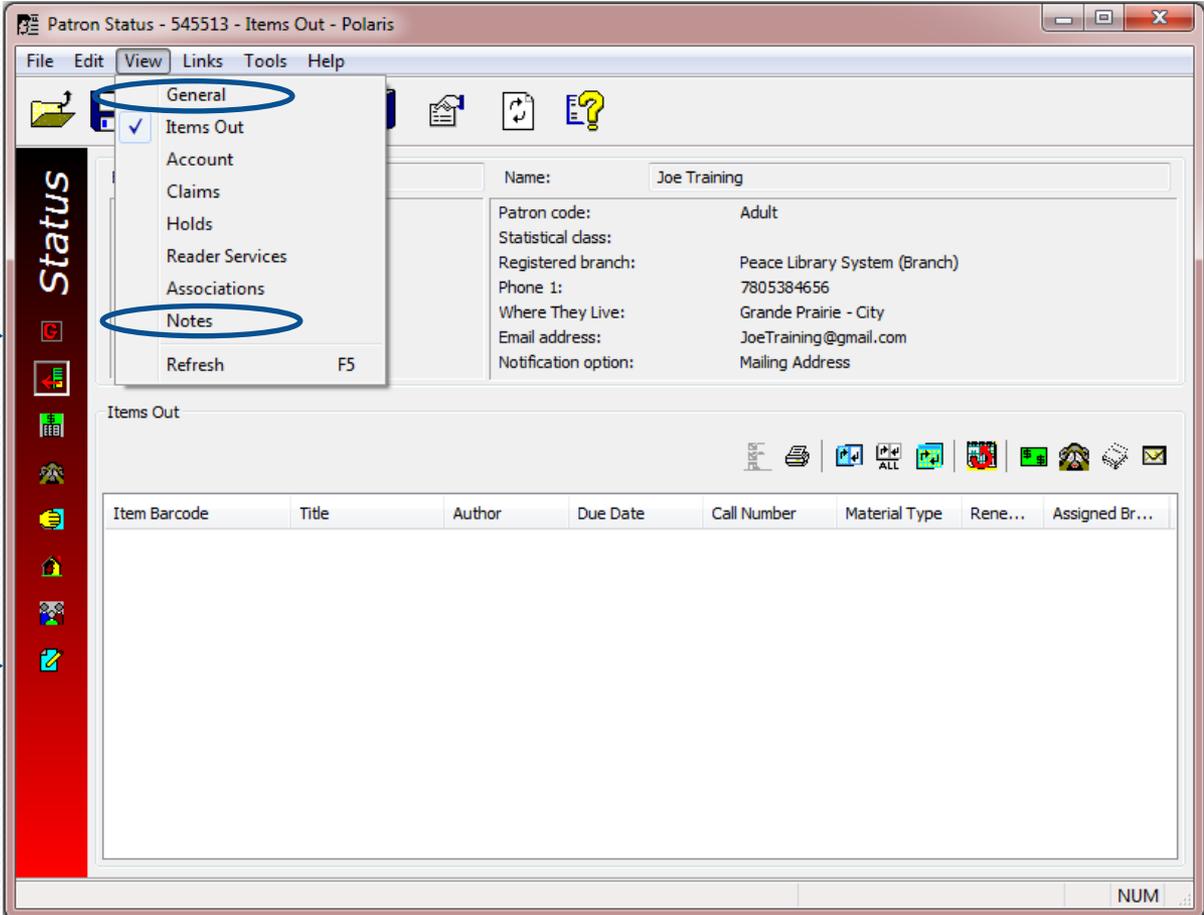

From the Polaris Toolbar, open the "Patron Status Work Form" from the Circulation drop down menu OR click on the Burgundy button, then the "Patron Status" icon.

Renewing a Registered Patron

Two views of the "Patron Status Workform" need to be examined and updated. They can be seen by choosing the "General" view and the "Notes" view from the "View" dropdown menu or by clicking on the first and last banner links.

Renewing a Registered Patron

On the "General View" of the "Patron Status Workform" the "Blocks" in the lower right corner must be deleted. Click on the blocking text to highlight in blue, then click "Delete" underneath the "Block" box. The first message (Patron has notes) directs you to click on the bottom icon and move to the "Notes View".

Renewing a Registered Patron

On the "Notes View" of the "Patron Status Workform" various notes may be present. Below, a "Blocking" note is preventing card use, and has caused the "Notes" icon to appear red colored (It is yellow if the "Non-blocking" note field has an entry). Clear up any "Blocking" notes with the patron so they may resume use of their card.

Renewing a Registered Patron

Remember to **Save** your work!

Questions?

Call PLS and talk to a member of the consulting team!
780-538-4656
1-800-422-6875